



# STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**

One Stop Licensing Specialist

**Job Code Title**

Customer Service Assistant III

**Pay Band**

04

**Job Code Number**

434514

**Citizen Services and Resource Management Division**

Citizen Services Bureau

**Fair Labor Standards Act**

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Citizen Services and Resource Management Division administers the accounting, purchasing, safety, security, statewide facility functions, call center, forms design, one-stop business licensing coordination, and receipt and distribution of unclaimed property. The division includes the Financial and Asset Management Bureau and the Citizen Services Bureau. The Citizen Services Bureau operates the Call Center whereby citizens can call with questions, inquire about their tax accounts, and get the information needed to conduct business with the department; administers the One-Stop Licensing Program which is a one-stop shopping for businesses to register and renew their business licenses from numerous agencies participating in the program; advertises unclaimed property that has been turned over to the state in an effort to locate the rightful owners and processes claims for the return of the property; and coordinates the annual design of forms, tax returns, and instructions for administering taxes and licenses.

**Job Responsibilities**

The One Stop Licensing Specialist is the primary contact for business owners, agency partners, and internal and external customers that choose to participate in the one stop licensing program. The incumbent provides information and technical assistance to businesses that require licenses from either the department or another state licensing agency including Agriculture, Environmental Quality, Labor and Industry, and Public Health and Human Services. Answers questions, provides the necessary license forms, and resolves problems regarding registration, payment processing, and issuing of licenses. The position reports to the Citizen Services Bureau Chief and does not supervise other staff.

**• One Stop Licensing 90%**

1. Registers businesses that complete the one-stop licensing master application in the web-based system and forwards the appropriate paperwork to participating agencies. Issues the one-stop license with all the appropriate licenses once approval is received from all agencies.
2. Processes payments to the business's account in the system. Creates the transfer to the statewide accounting system that sends the appropriate funds to each agency partner. The payments are processed and transferred to the agency partners within 48 hours.
3. Processes credit card payments on behalf of the business owner in the virtual terminal payment processing system through Montana Interactive, Inc. (MII).
4. Issues renewal notices to existing accounts 30 days prior to the expiration of their license.

5. Sends delinquent notices to those businesses that have not renewed their license.
6. Coordinates all service requests for changes or corrections in the one-stop licensing system. Writes the service request on behalf of all agencies and submits it to the bureau chief for review and approval.
7. Tests and approves all changes to the one-stop licensing system requested through service requests. Notifies agency partners when changes have been moved to production.
8. Monitors the one-stop licensing email box for correspondence from business owners as well as agency partners and for emails requiring follow-up to work that has been completed in the system by partner agencies.
9. Provides an overview of the one-stop licensing program at each quarterly One-Stop Board of Review meeting. Answers questions from board members related to program work.
10. Identifies training needs for the call center and agency partners based on referred questions. Develops and updates desktop instructions and training materials for the one-stop program and system. Provides training and mentoring for new licensing specialists. Backs up staff and agency partners as needed.

- **Customer Service 5%**

1. Resolves questions, concerns, and potential problems for one-stop licensing users in accordance with confidentiality laws related to taxpayer information.
2. Provides customer service to all divisions of the department, members of the public, and others to ensure courteous and efficient responses to inquiries and requests for assistance such as making calls on behalf of another division to set up public meetings or gather information pertaining to a specific subject matter.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the supervisor.

### **Job Requirements**

To perform successfully as an unclaimed property specialist, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in working with multiple tasks under tight deadlines; verbal and written communication; effective conflict resolution techniques; research and analysis of applicable tax types, laws, statutes, rules, and procedures; reviewing technical and legal documents; compiling data from multiple sources; identifying and resolving technical errors; and word processing, spreadsheet, database, and other software applications are required. Incumbent is required to resolve conflicts and maintain accountability for actions. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of licensing, application, and processing procedures; technical accounting; applicable statutes, rules, policies, and procedures; department business practices; office operations; business communications; records management; research and analysis techniques; and customer service standards.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work are two years of post-secondary education in business administration, taxation, office management, or a related field and one year of directly related work experience.
  - Work experience should include customer service, investigation, auditing, or research and analysis with six months of experience interpreting and applying Montana rules and regulations.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as

equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.

- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. The ability to work in an office setting with noise distractions and frequent interruptions is required. At times, the incumbent will deal with angry and difficult individuals to resolve taxpayer concerns or bring about compliance with regulations. This may cause stressful work conditions. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires computer and keyboard use. The incumbent spends a considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. During peak tax seasons, incumbent may work in excess of 40 hours per week. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

### **Special requirements**

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Steve Austin, Division Administrator Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name (print): \_\_\_\_\_